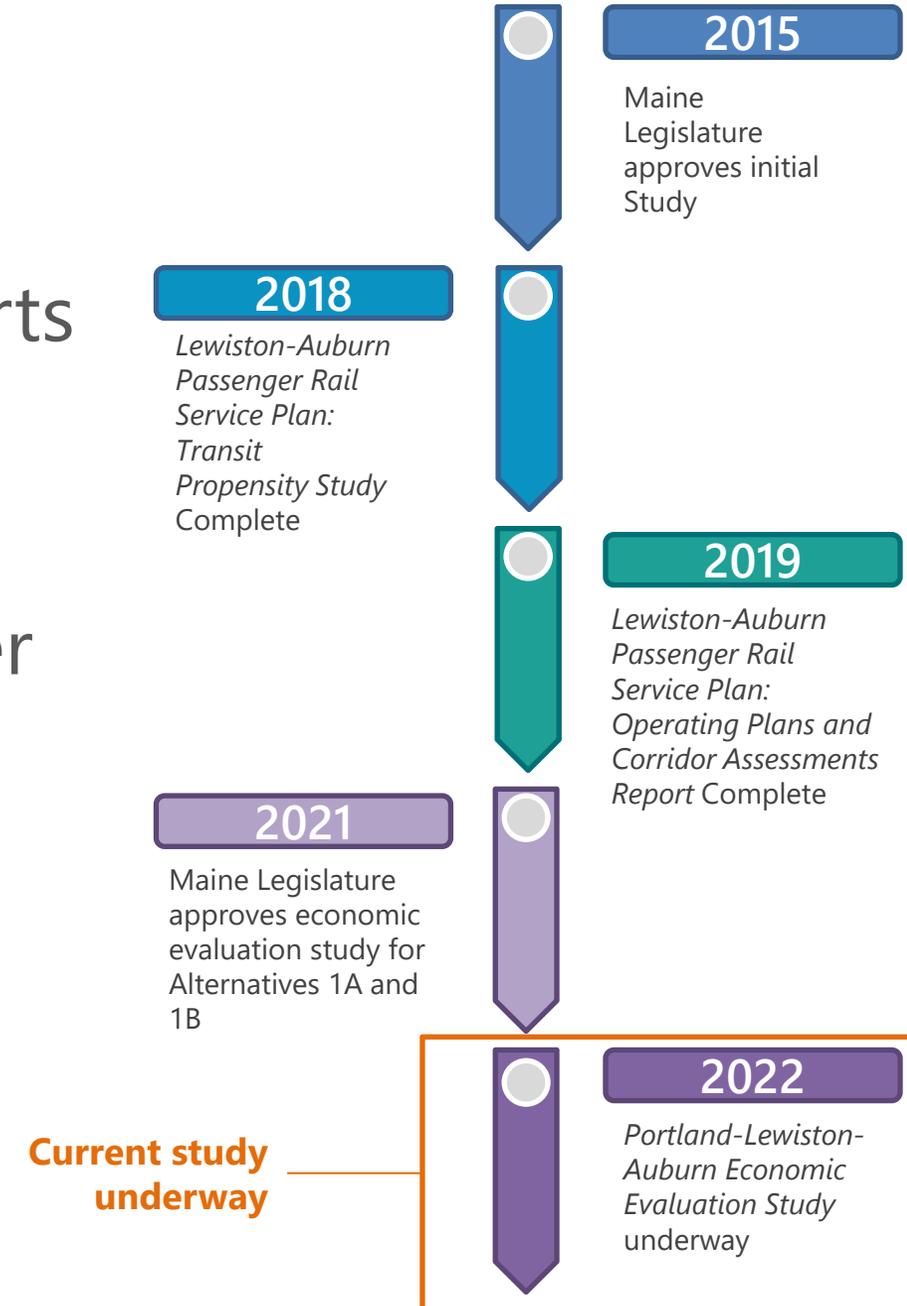


Agenda

- Project Purpose and Outcomes
- Market Analysis Results Overview
- Station Area Evaluation and Concepts
- Next Steps

Project Background

- Continue planning and evaluation efforts for Lewiston-Auburn Passenger Rail Study
- Conduct economic evaluation study per direction from Maine Legislature

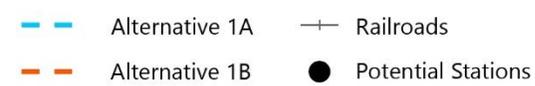


Project Purpose

- Evaluate potential development demand around station areas for Alternatives 1A/1B
- Visualize potential station developments based on analysis and public/stakeholder input
- Compare findings for Alternatives 1A/1B

Study Area

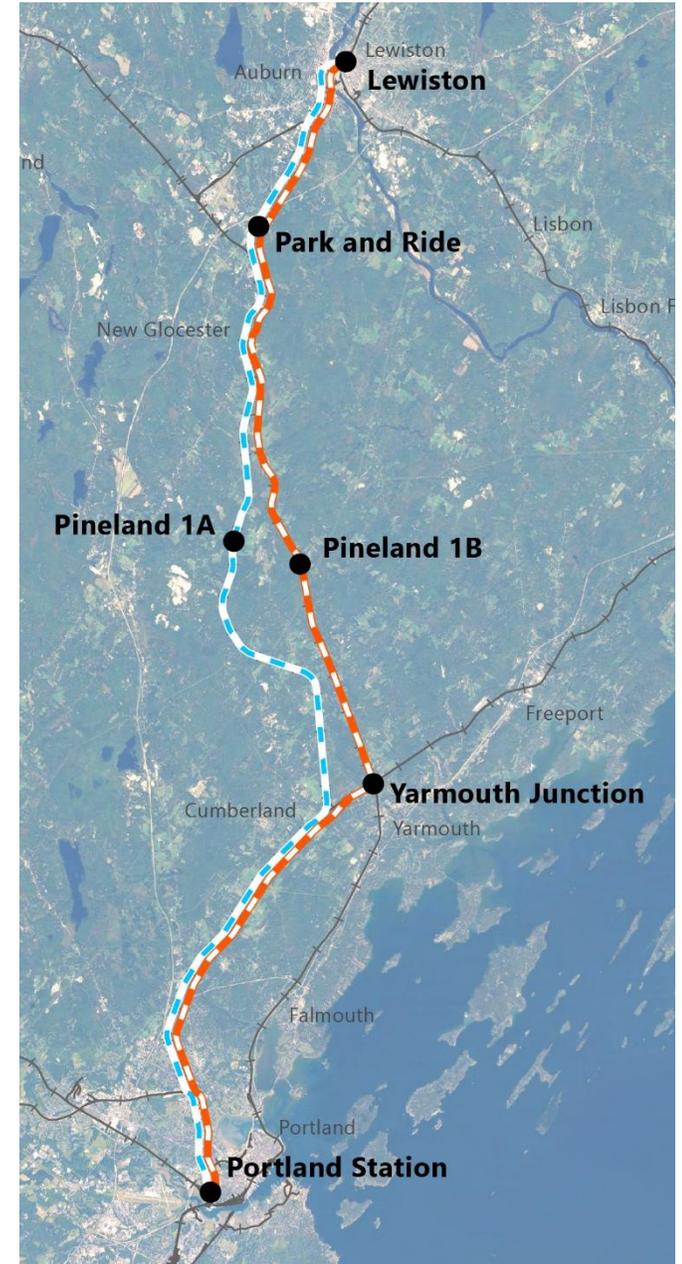
- Alternatives
 - 1A (Pan Am)
 - 1B (SLR)
- Potential Stations
 - Lewiston (1A/1B)
 - Auburn Park and Ride (1A/1B)
 - Pineland (1A/1B)
 - Yarmouth Junction (1B)



Market Analysis Approach

- Define a catchment area around each proposed station location.
 - 15-minute walk (Lewiston)
 - 3-miles (all other stations)
- ↓
- Develop baseline projections of growth and demand
- ↓
- Based on project assumptions, evaluate potential development opportunities at each station location for the following demand:
 - Residential – estimated rental and owner units
 - Commercial – estimated square footage demand
 - Retail – estimated square footage demand
 - Service – estimated square footage demand
 - Office – estimated square footage demand

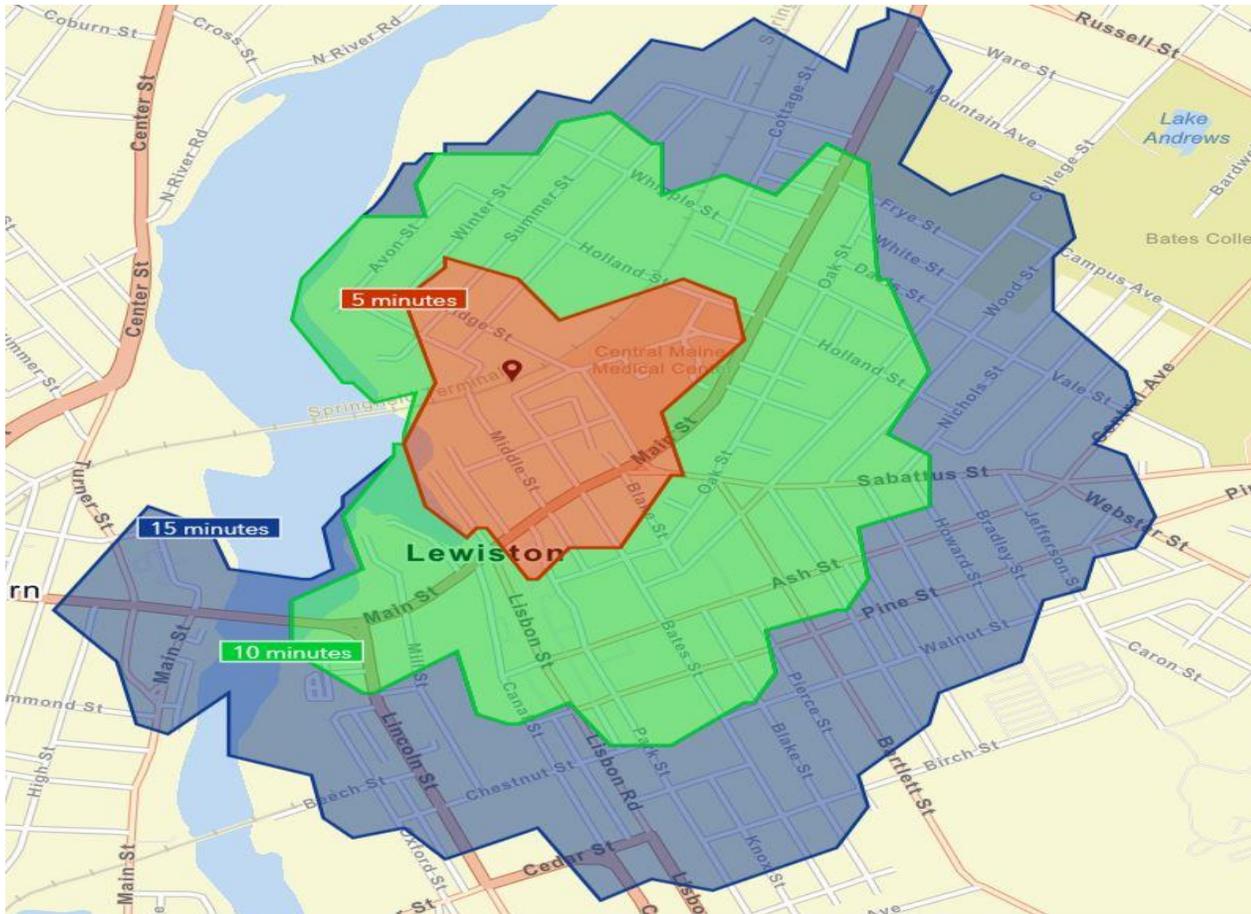
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Station Study Areas

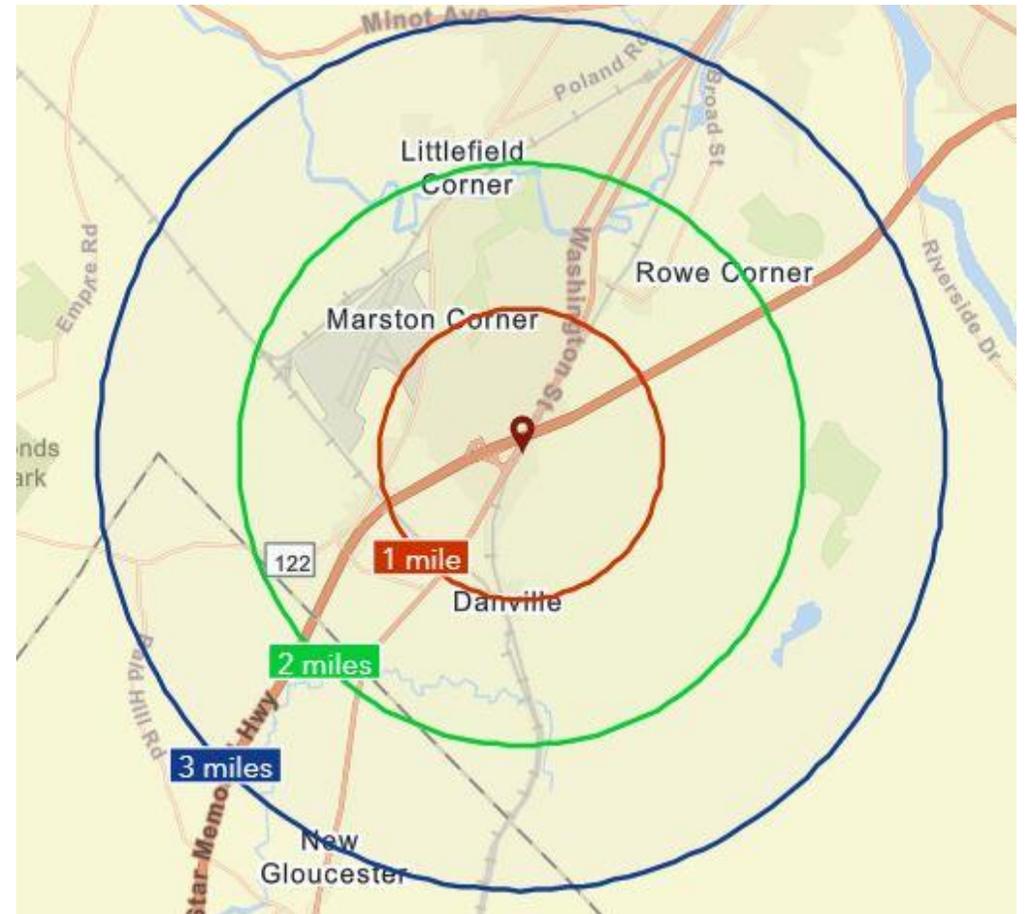
Lewiston Station Study Area (both 1A/1B)

5, 10, 15-minute walksheds



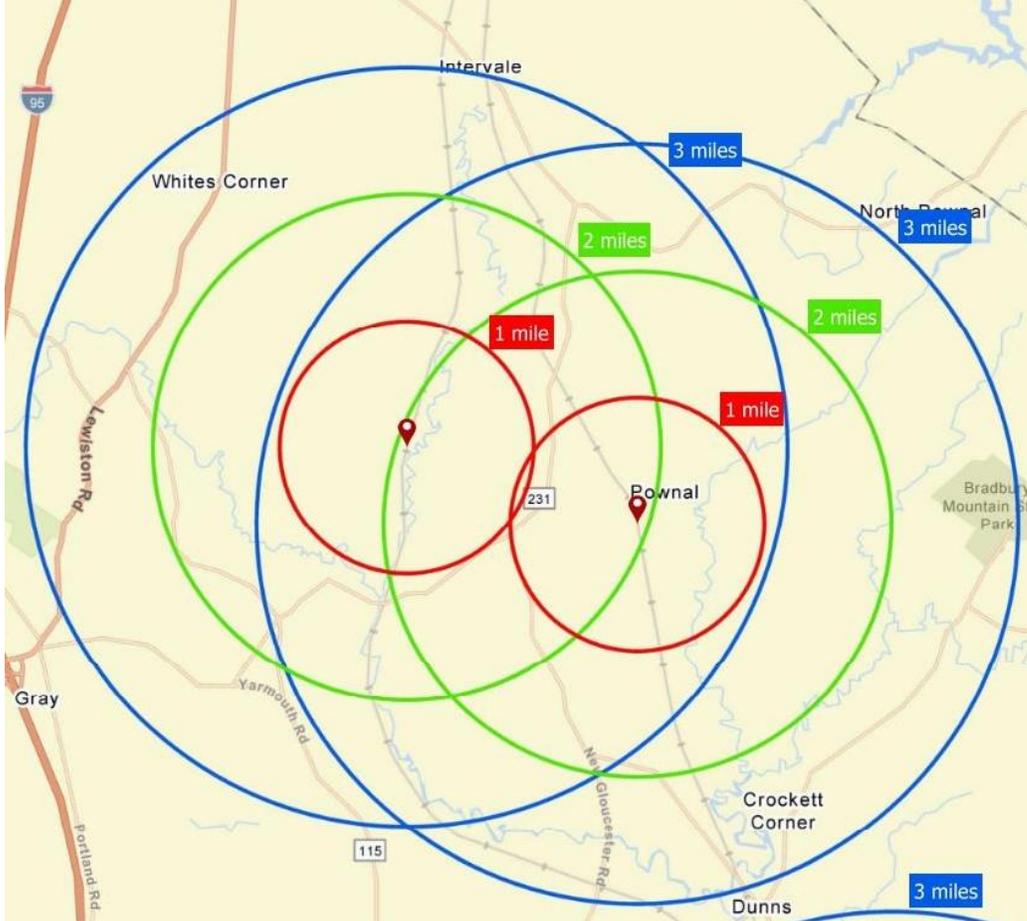
Auburn Station Study Area (both 1A/1B)

1, 2, 3-mile buffers

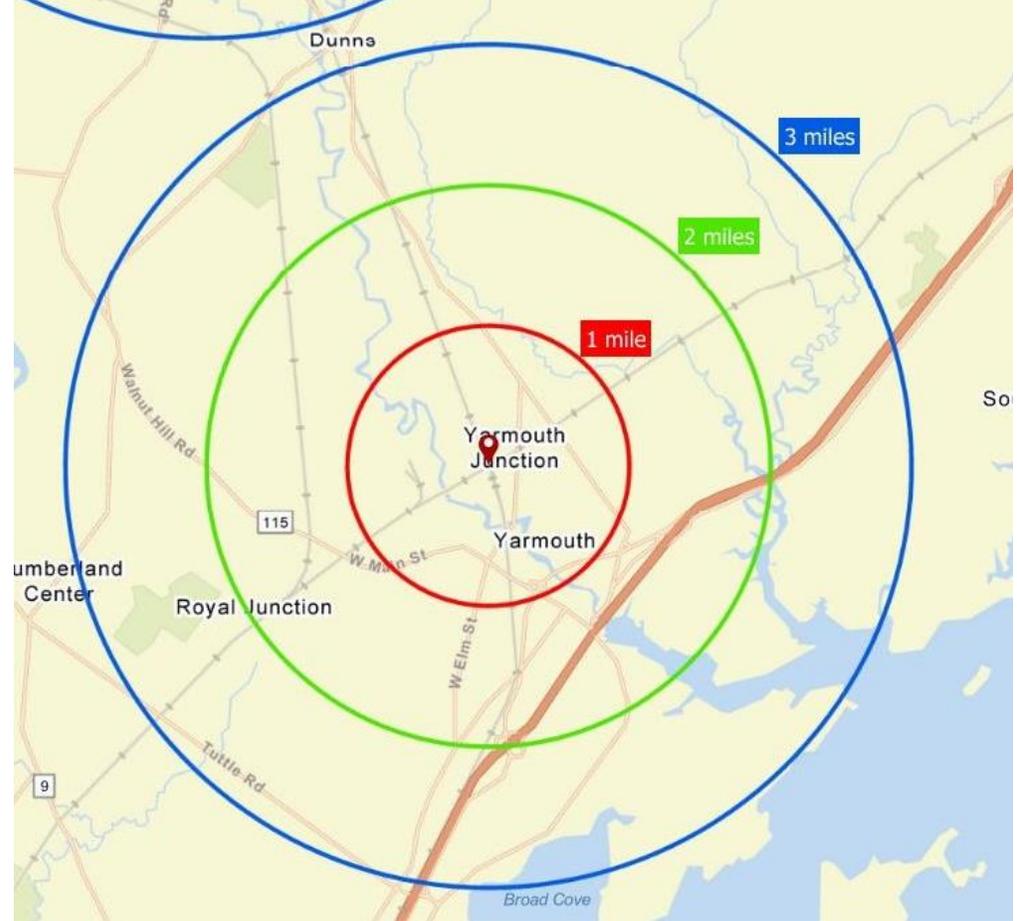


Station Study Areas

Pineland Station Study Areas (West 1A and East 1B)
1, 2, 3-mile buffers

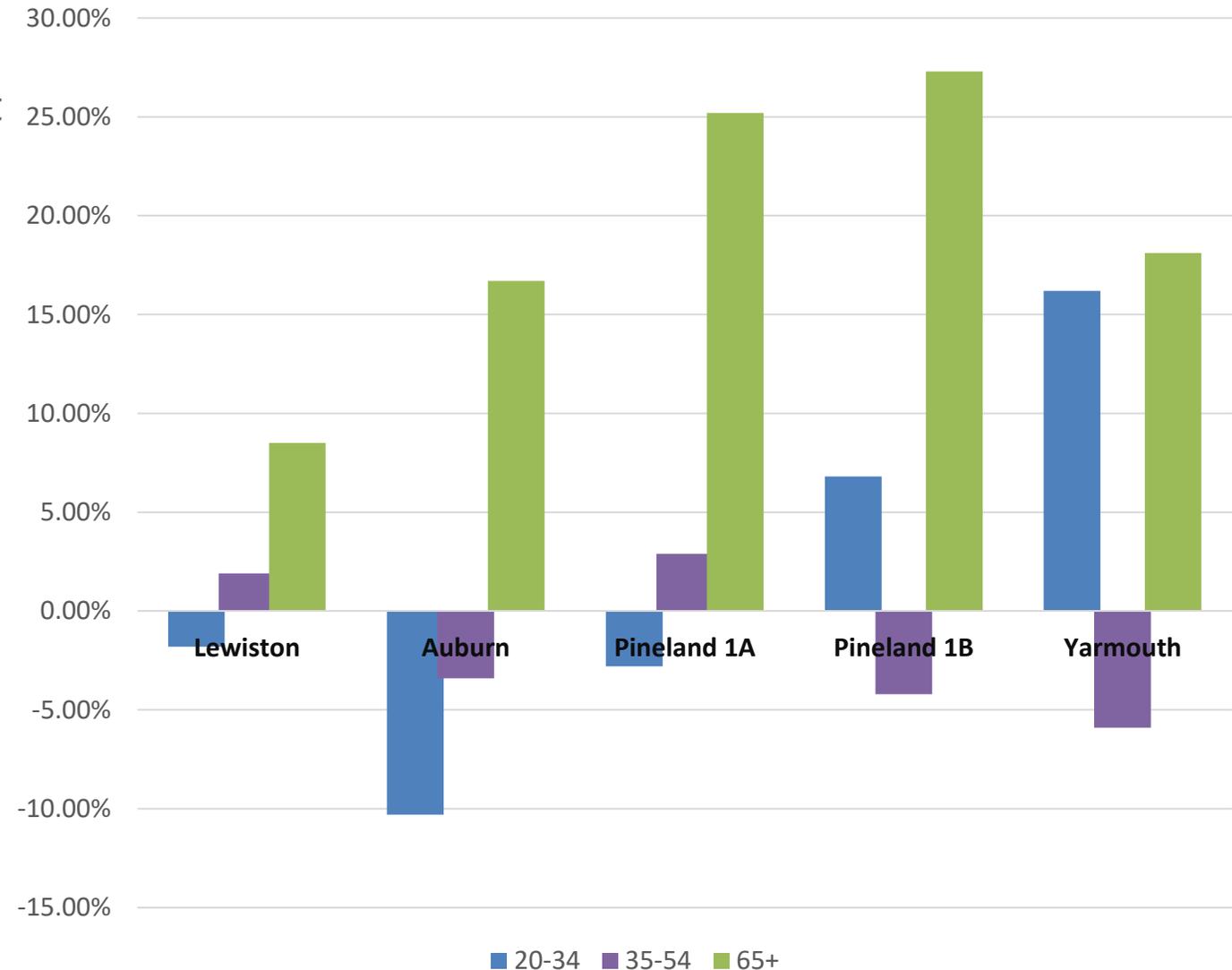


Yarmouth Junction 1B
1, 2, 3-mile buffers



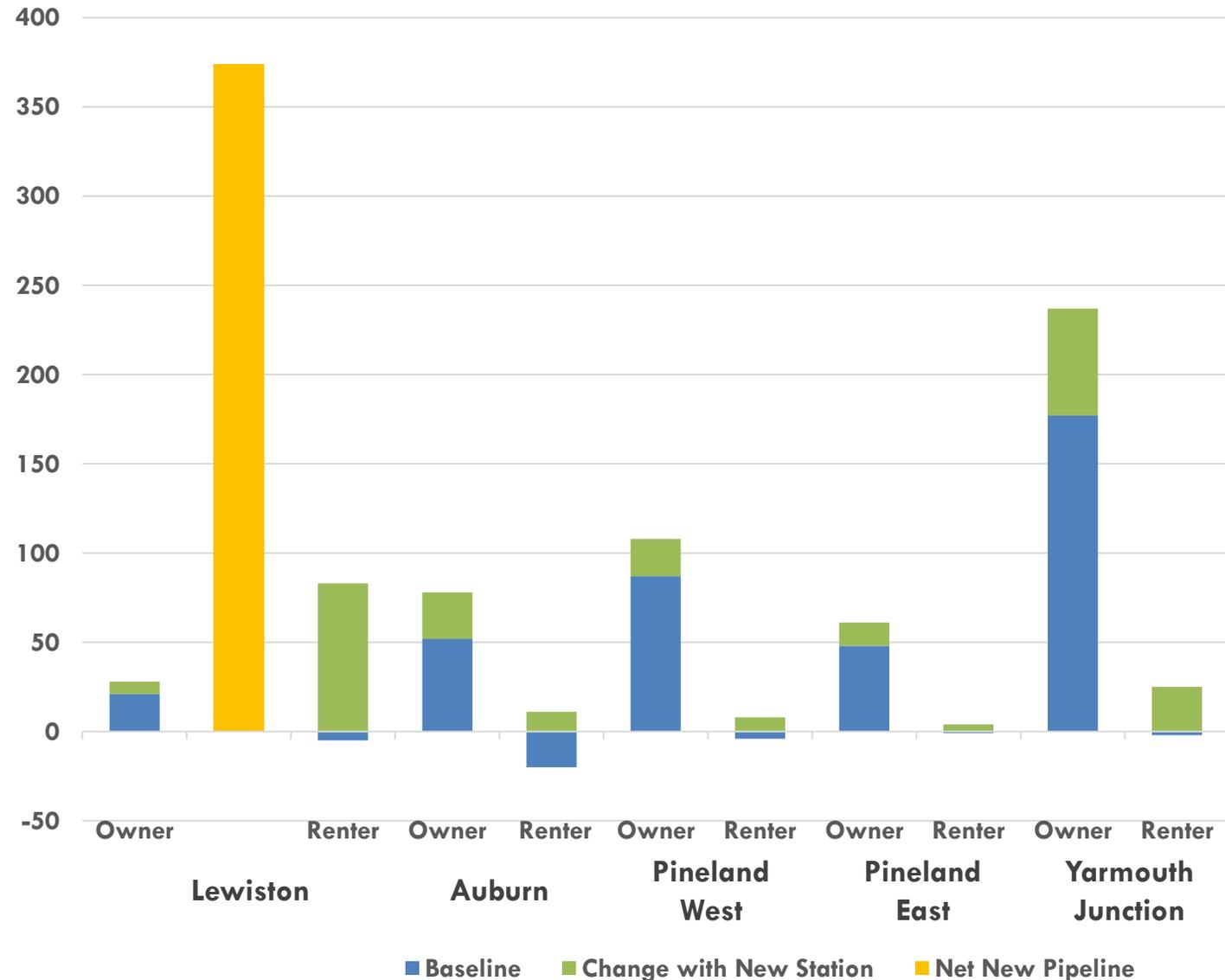
Population Change 2021 – 2026 for Selected Cohorts

- **Ages 20 to 34** – typically those starting first household formations, often as renters.
 - Projected declines for Lewiston, Auburn and Pineland West.
- **Ages 35 to 54** – often those in their family formation years and home buying years, as well as peak earning and spending years.
 - Projected marginal increases for Lewiston and Pineland West.
- **Ages 65 and older** – those in their downsizing years, often for renter housing or smaller owner condominium housing – often for assisted living or other elderly care typologies.



Projected Demand Opportunities for Housing Units

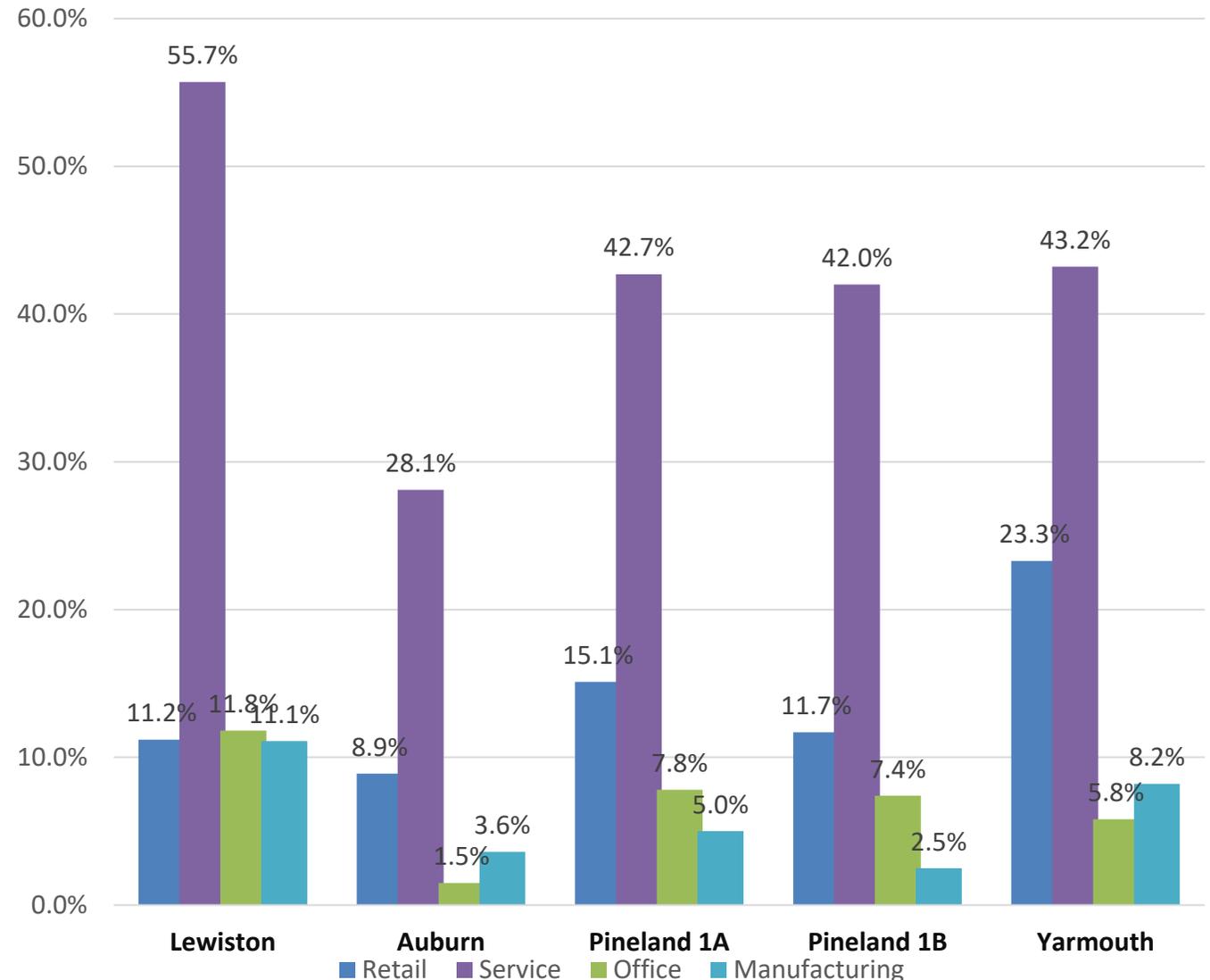
- **Baseline** – within each Station study area there is some projected change in owner and renter housing, generally an increase in owner and decrease in renter.
- **Increase County Share**– “new” housing, commuter rail and Station amenities could create increased desirability for the Station study area relative to the county.
 - More robust opportunities for Lewiston and Yarmouth Junction
- **Note** - possibility that some owner demand (if owner condominiums) could translate to renter demand if targeted to cohort aged 65+.



Existing Employment by Selected Industry Sector for 2021

Percentage of all employment in study area.

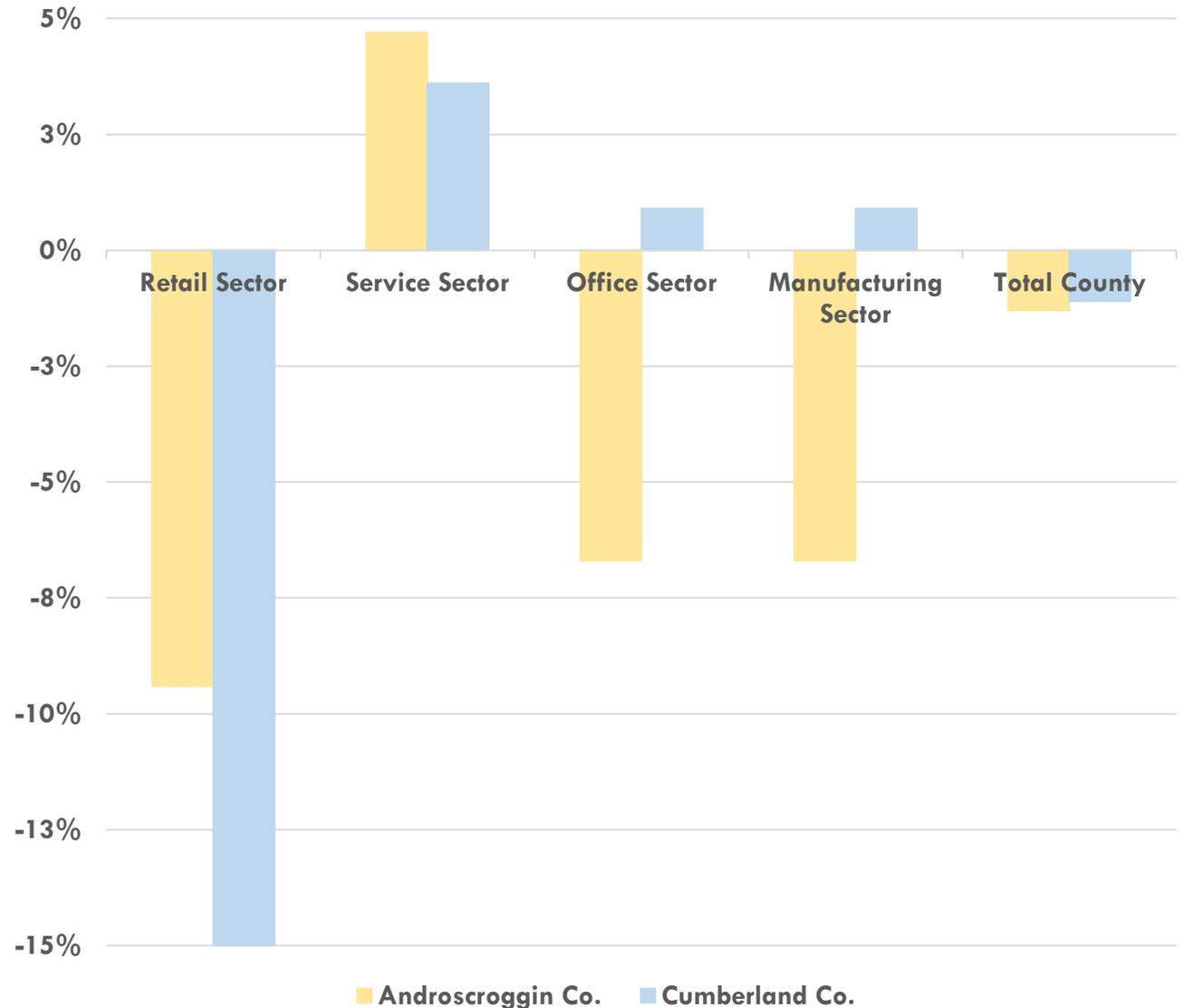
- **Retail Sector** – highest in Yarmouth Junction
- **Service Sector** – generally heavy concentrations across all Station study areas
- **Office Sector** – less than 10.0% for all but Lewiston with 11.8% of Station
- **Note** - retail and service sector jobs are often lower wage positions relative to other sectors.



Projected County Employment Growth 2022 - 2031

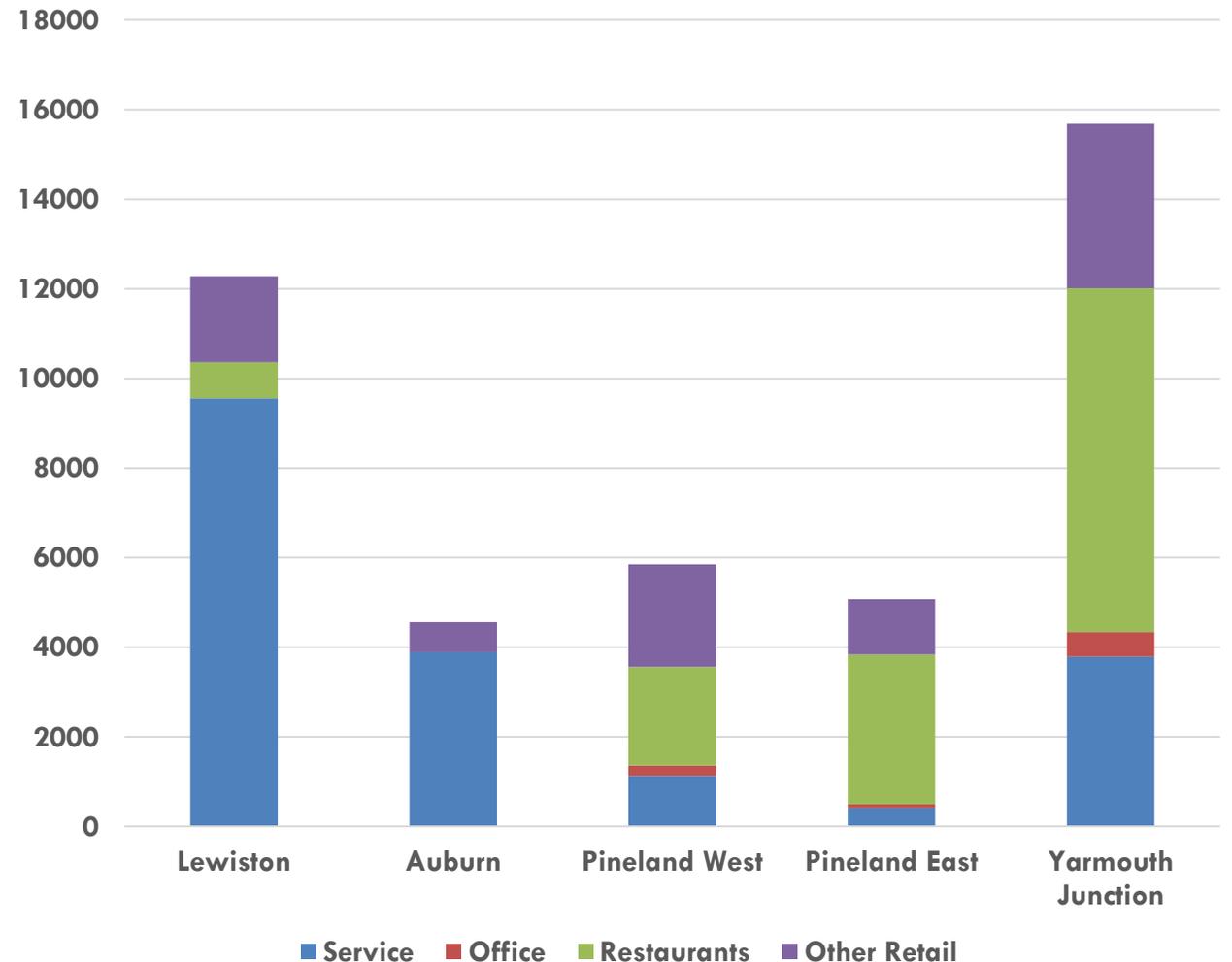
- **Androscoggin County** – employment projections indicate a loss of jobs for all sectors except the service sector with a projected growth of 822 positions.
- **Cumberland County** – some projected growth in the manufacturing sector and 490 positions in the office sector and 2,441 jobs in the service sector.

Station study area employment distribution was held constant and then applied to the Station study areas for projected change in employment, by industry sector, by Station study area.



Estimates of Supportable Retail & Non-Retail SF of Development

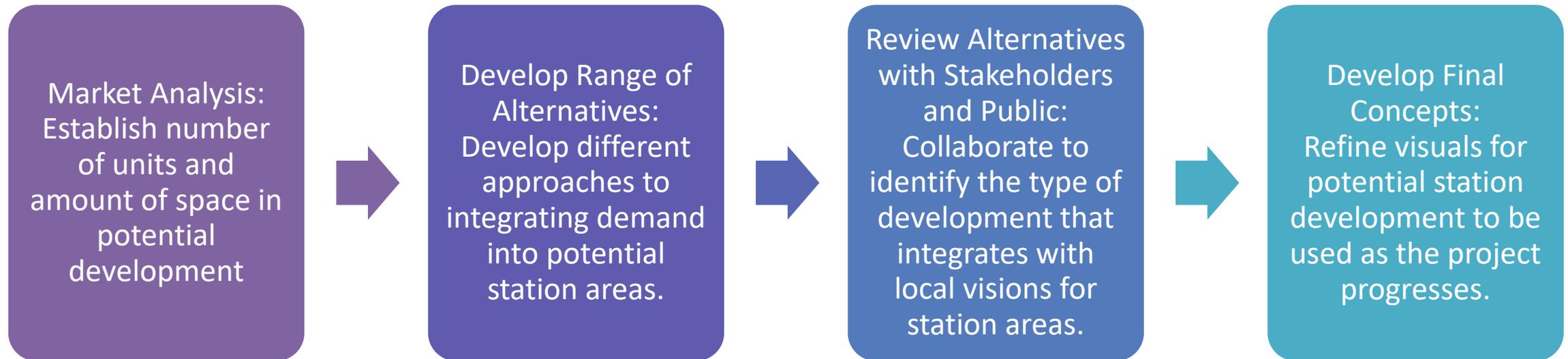
- Employment growth was then translated to demand for additional development using typical SF per employee metrics. Assumed 25.0% of growth is new build space.
- **Note** - commercial could be ground level in a mid-rise mixed-use project. This increases density and enhances developer financial feasibility.
- Assumed a 35.0% re-capture could result in supportable demand for additional retail SF
- May include new build or expansion of existing
- Assumed average metrics of sales per SF
- Potential spending impact of pipeline housing in Lewiston



Market Analysis – Key Takeaways

- Residential development opportunity is present for each potential station area
 - Lewiston highest for renter units
 - Potential for owner occupied at other stations
 - Smaller, higher density may be more cost effective to build
 - May be opportunity to target the 65+ population
- Retail and non-retail opportunity is present for each potential station area
 - Service sector highest in Lewiston, similar in Auburn, Yarmouth Junction
 - Potential space could integrate as a ground floor use of a mixed-use project.
- Retail development opportunities are strongest for restaurants and other specialty retailers
 - Commuter rail ridership demand may translate into additional spending or larger space for existing/planned retailers

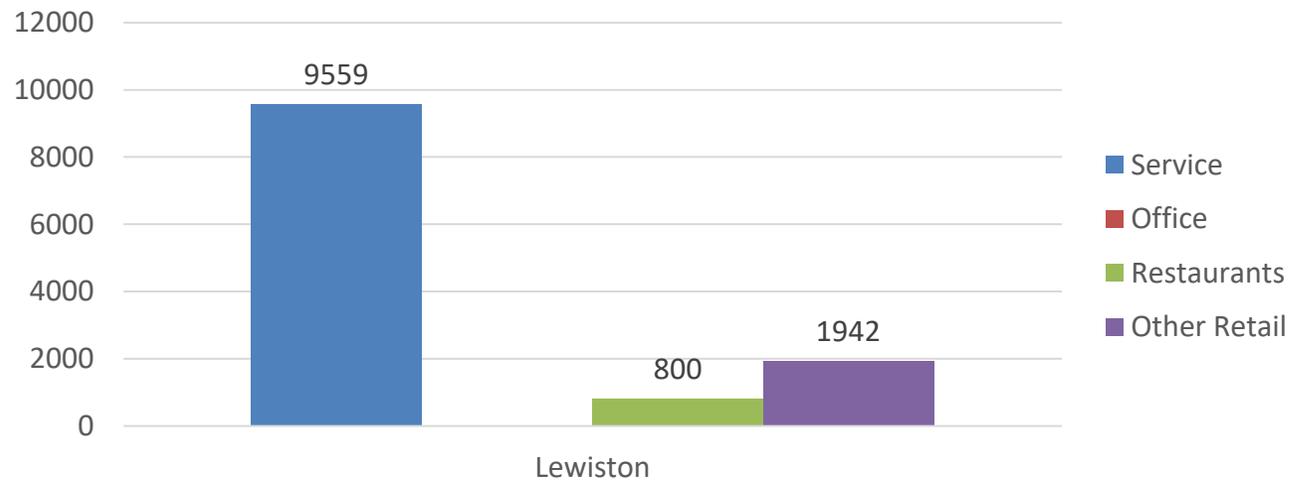
Station Visuals Approach



Lewiston Station Area Visual Alternatives

- **Key market analysis takeaways:**
 - Pipeline developments
 - 372 units
 - New units with increased county capture
 - 85-125 rental
 - 25-35 owner

Development Potential – Square Footage



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Lewiston Station Area Visual: Low Density

- Multiple residential buildings within walking distance to station
- Some mixed-use development integrated with existing land use
- Mostly apartment units
- Generally, complies with existing development codes
- Includes development along Main Street



Illustrative drawing only

Lewiston Station Area Visual: High Density

- Residential buildings and mixed use focused on station area
- Mixed-use development integrated with station
- Mostly apartment units
- Density in line with development codes, may require considerations for parking requirements

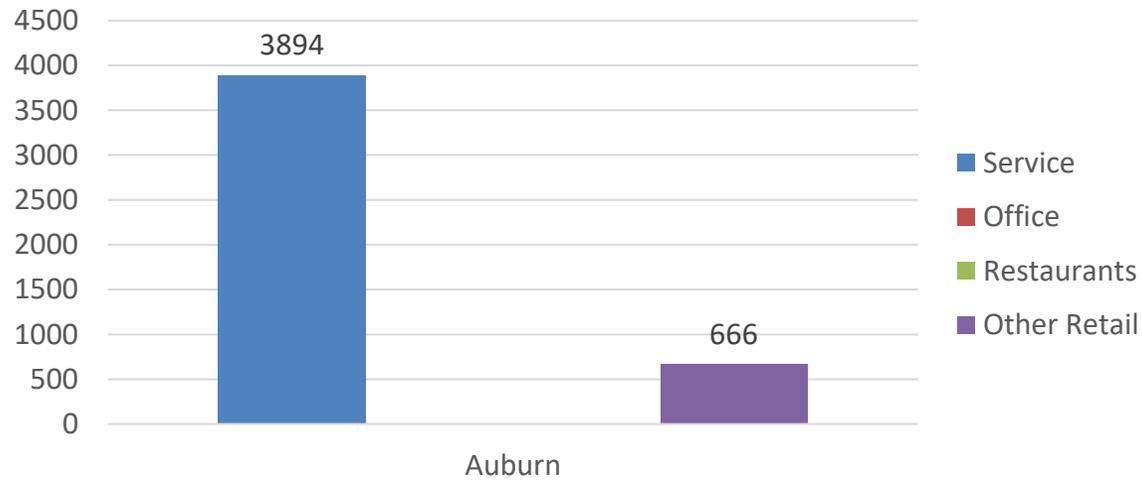


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Auburn Park and Ride Station Area Visual Alternatives

■ Key market analysis takeaway:

- Employment growth in service sector
 - Potential for retail,
 - Potential for senior housing
 - Lower density housing than Lewiston
 - Projected loss rental
 - 75-100 owner
- Development Potential – Square Footage

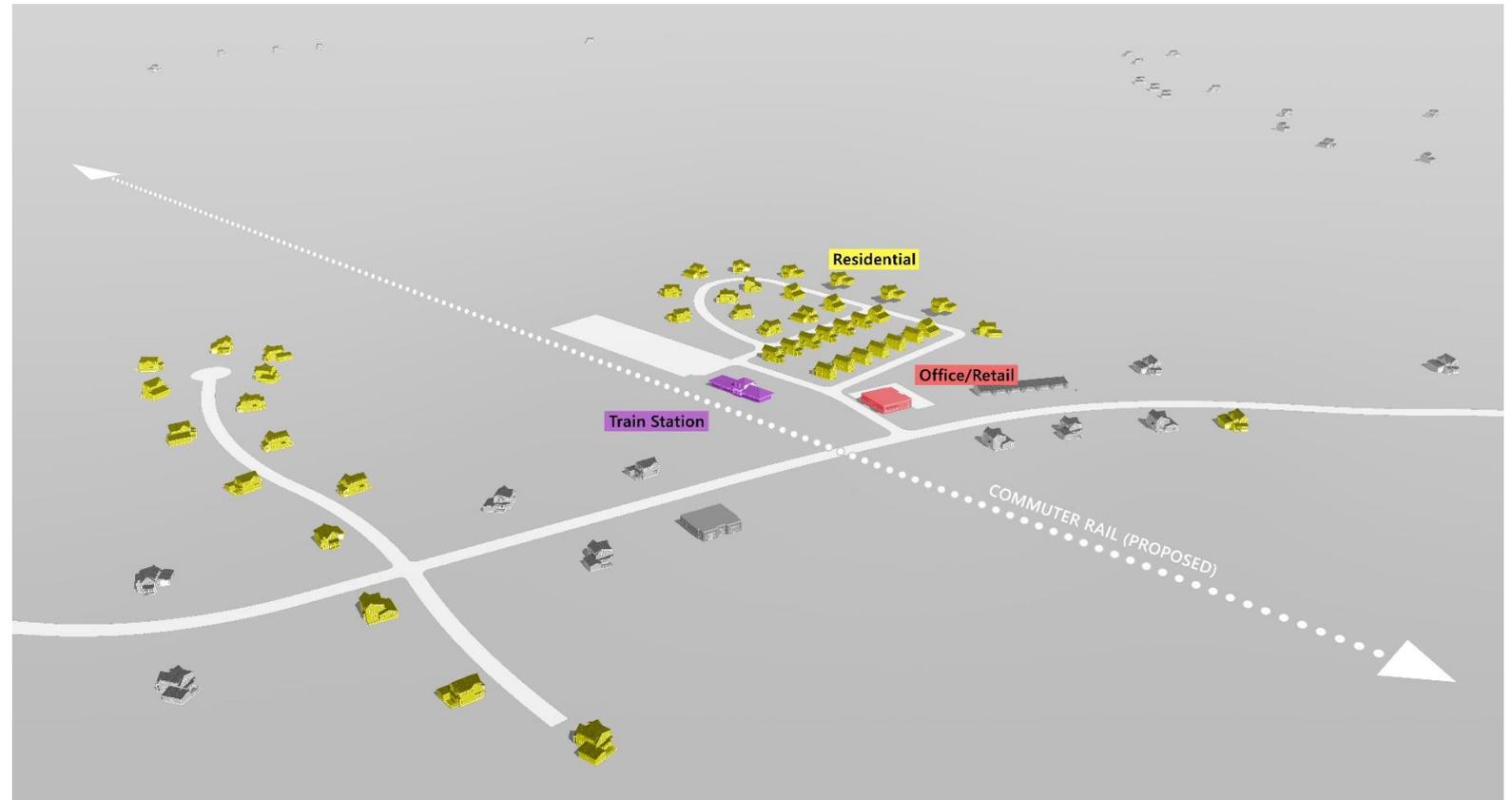


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Auburn Station Area Visual: Low Density

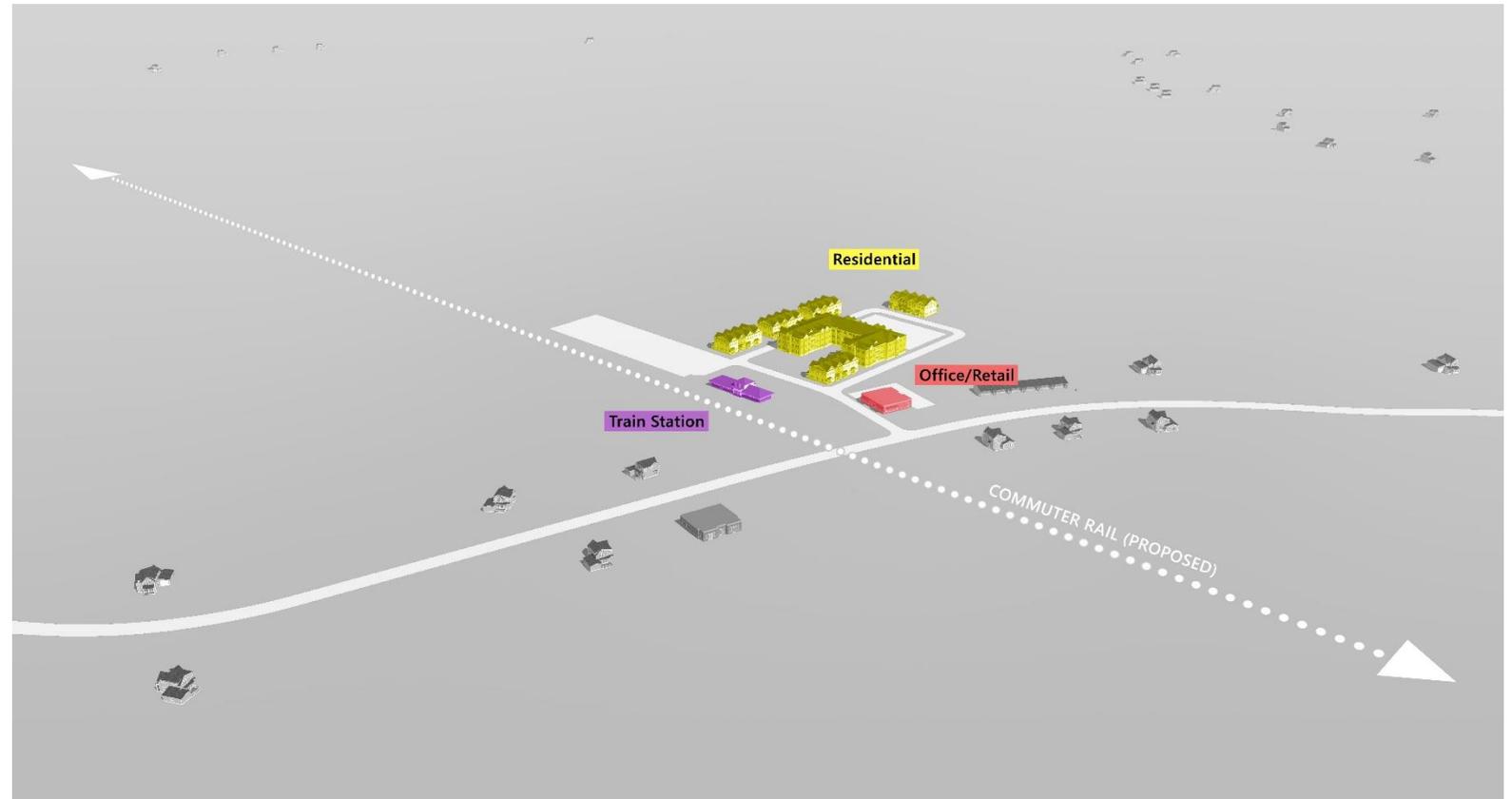
- Residential buildings include townhomes and single family
- Residential buildings spread near station area
- Office/retail use separated from residential
- Area zoned General Business, borders Industrial and Rural Residential
- Buildings can meet height and setback requirements



Illustrative drawing only

Auburn Station Area Visual: High Density

- Residential buildings focused on station area with apartments and townhomes
- Mixed-use development integrated with station
- Area zoned General Business, borders Industrial and Rural Residential
- Buildings can meet height and setback requirements



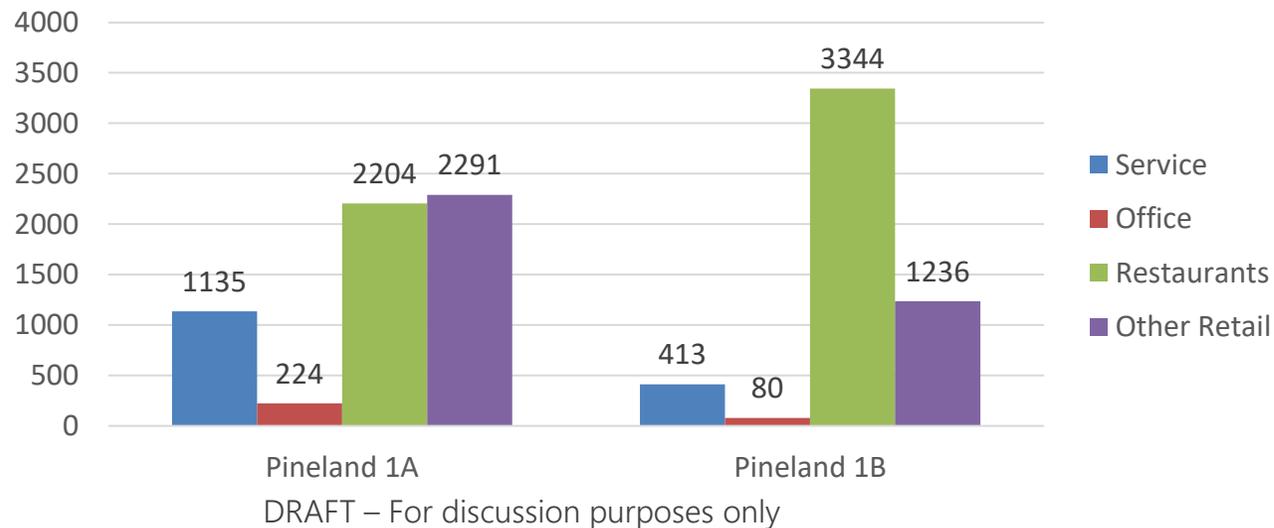
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Pineland Visual Alternatives

Key market analysis takeaway:

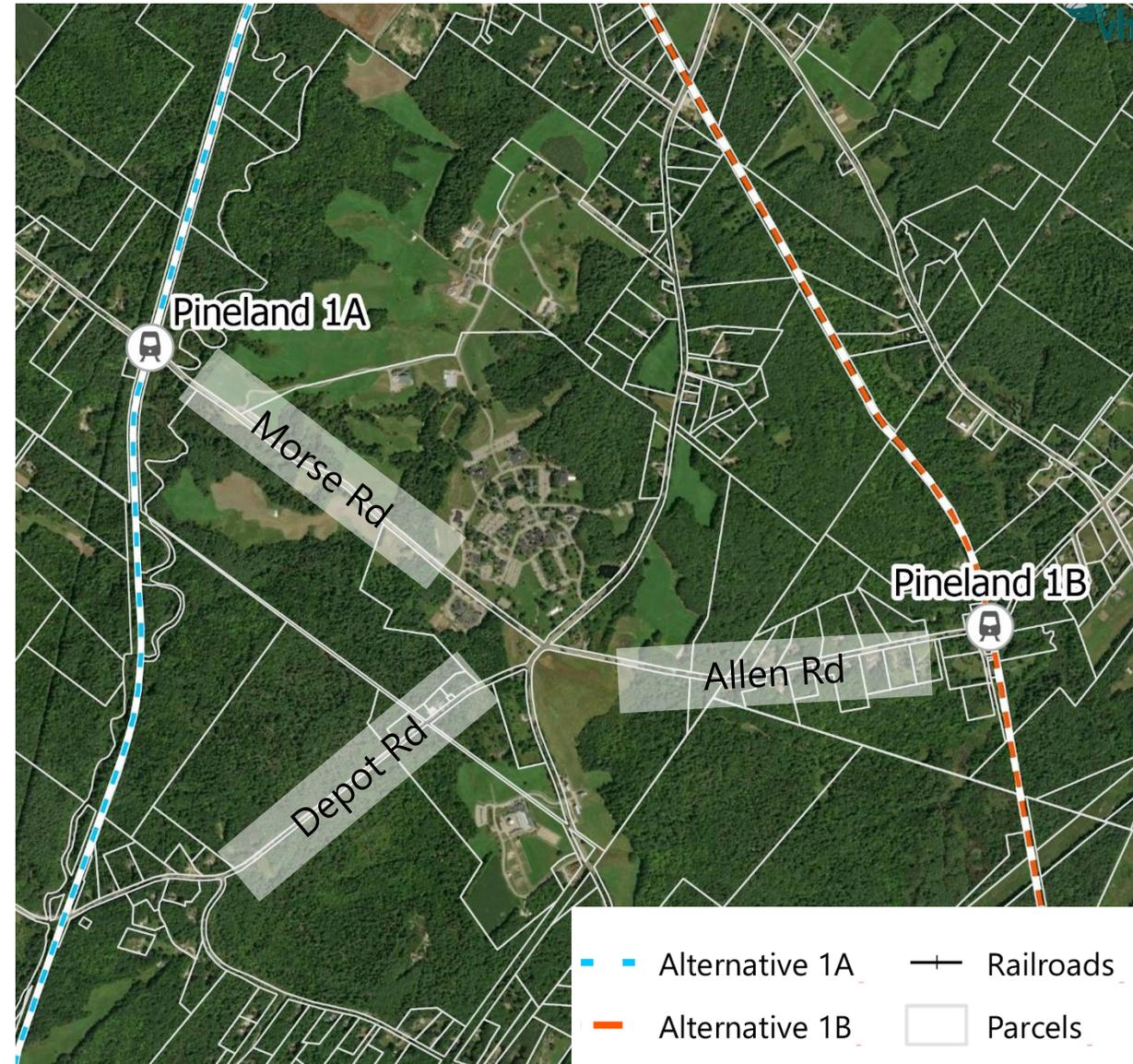
- Access to passenger rail a bonus, may not be main driver of development
- Potential for owner-occupied housing, senior housing
 - <10 rental
 - 60-120 owner
- Some supporting service industry

Development Potential – Square Footage



Pineland 1A Pineland 1B

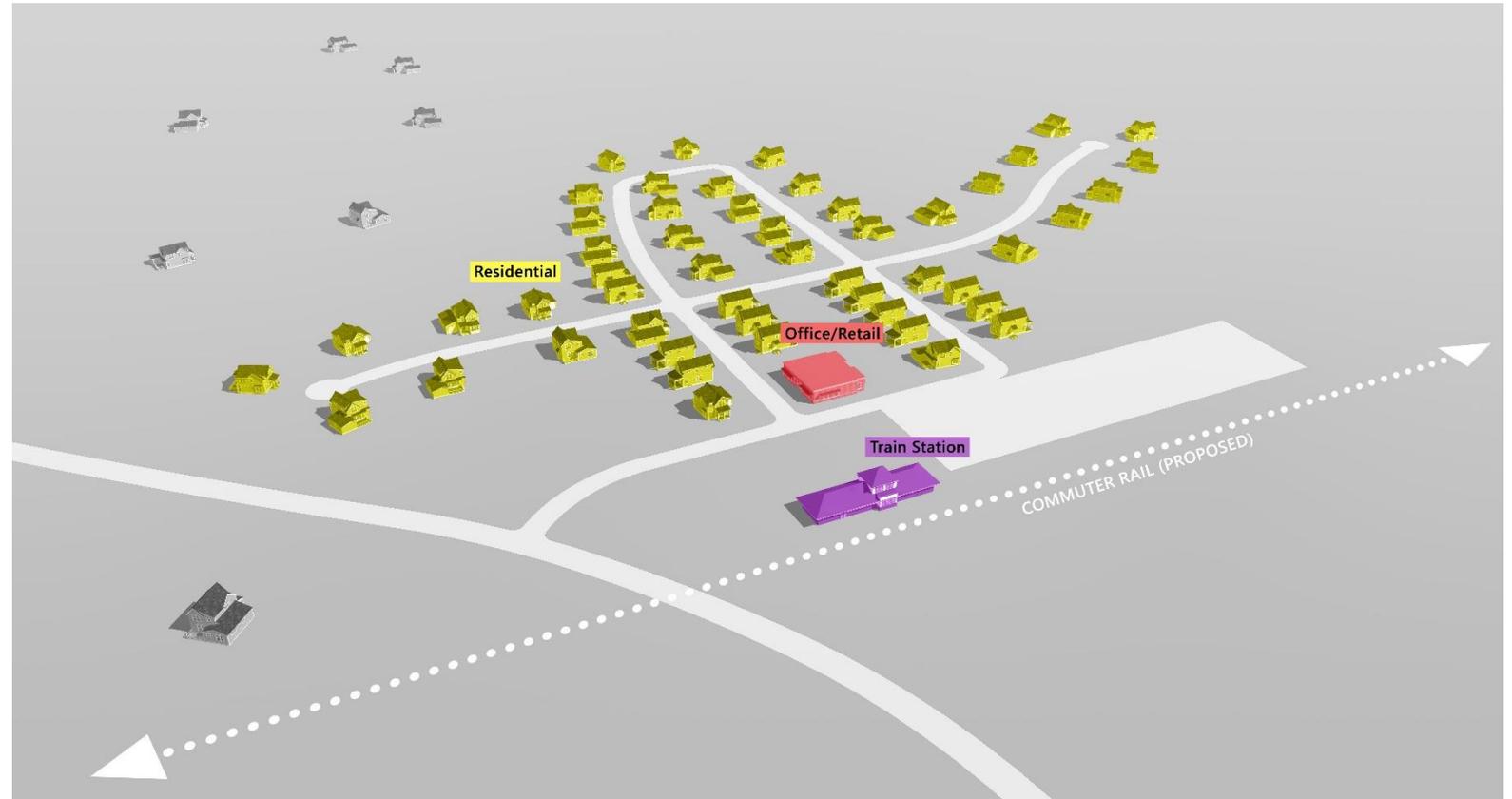
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	Alternative 1A		Railroads
	Alternative 1B		Parcels

Pineland Station Area Visual: Low Density

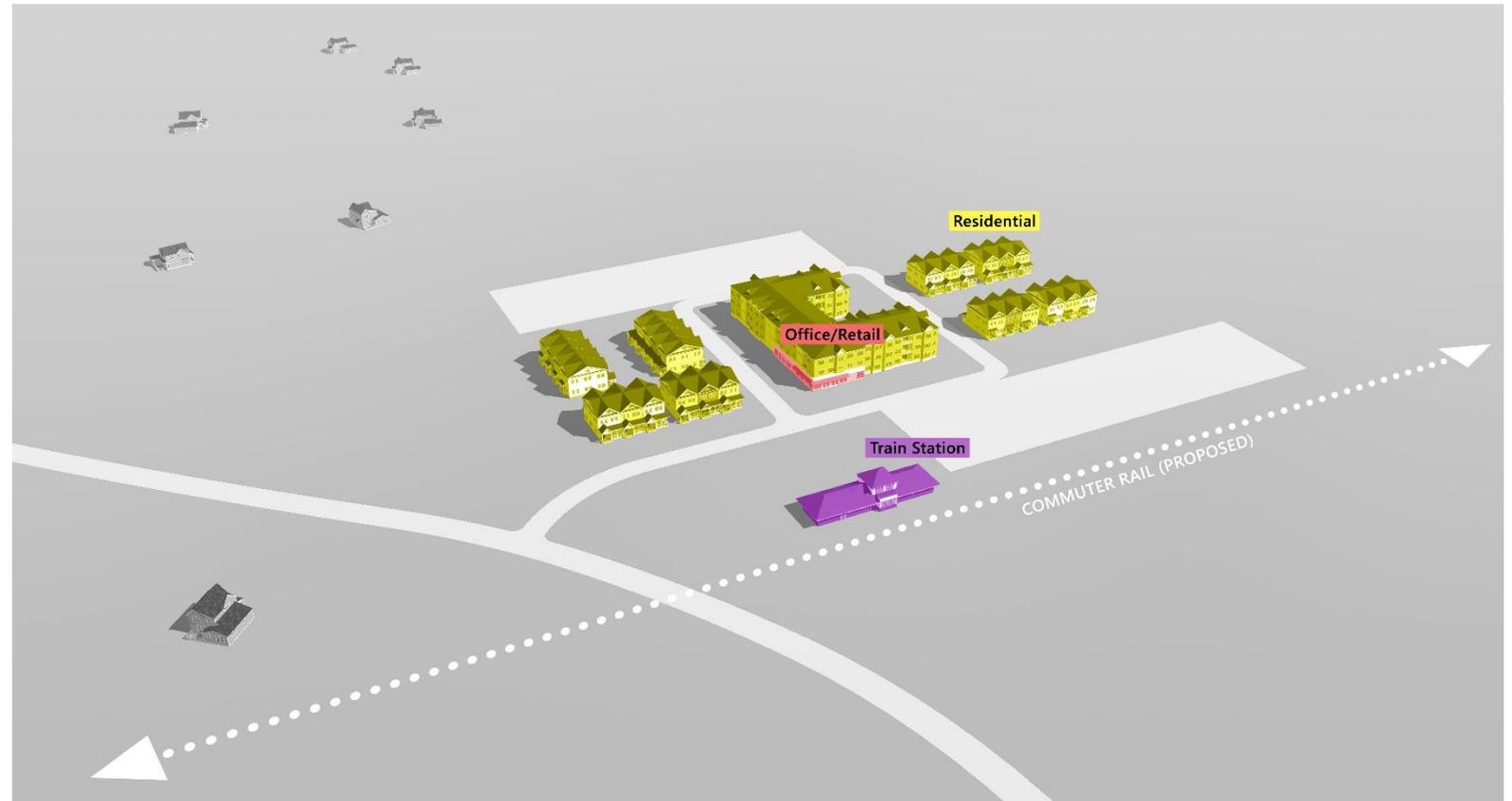
- Single family residential – in line with existing uses.
- Office/retail use separated from residential within walking distance to station
- Zones rural residential/agricultural with the goal of encouraging protection of rural/open space.
- Goal also to promote agritourism, accommodations, service, restaurants allowed.



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Pineland Station Area Visual: High Density

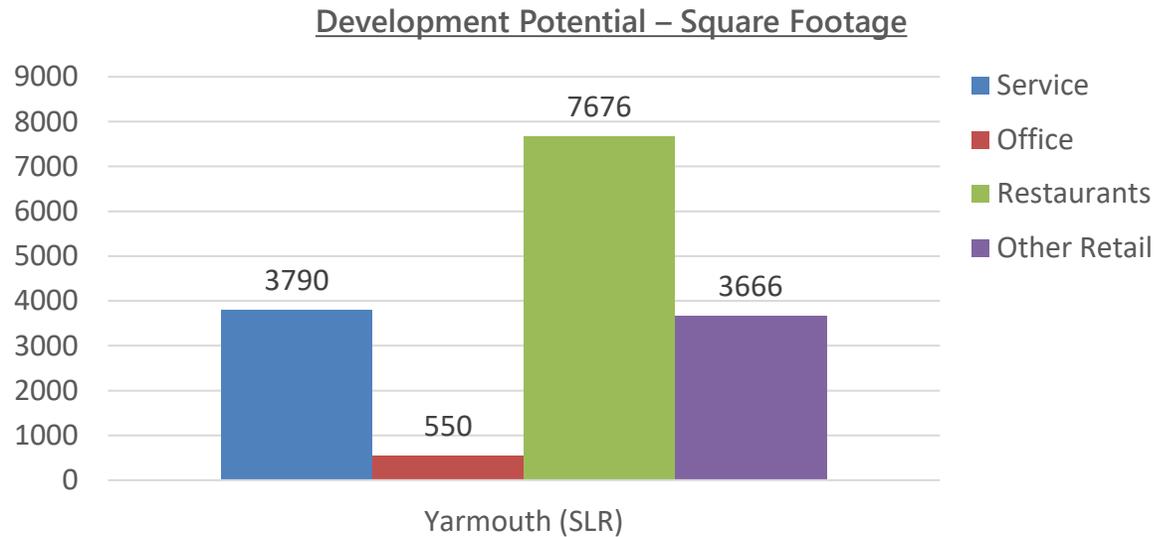
- Apartments/townhomes residential – more consolidated to preserve open space
- Office/retail use integrated into mixed use development
- Zones rural residential/agricultural with the goal of encouraging protection of rural/open space.
- Goal also to promote agritourism, accommodations, service, restaurants allowed.



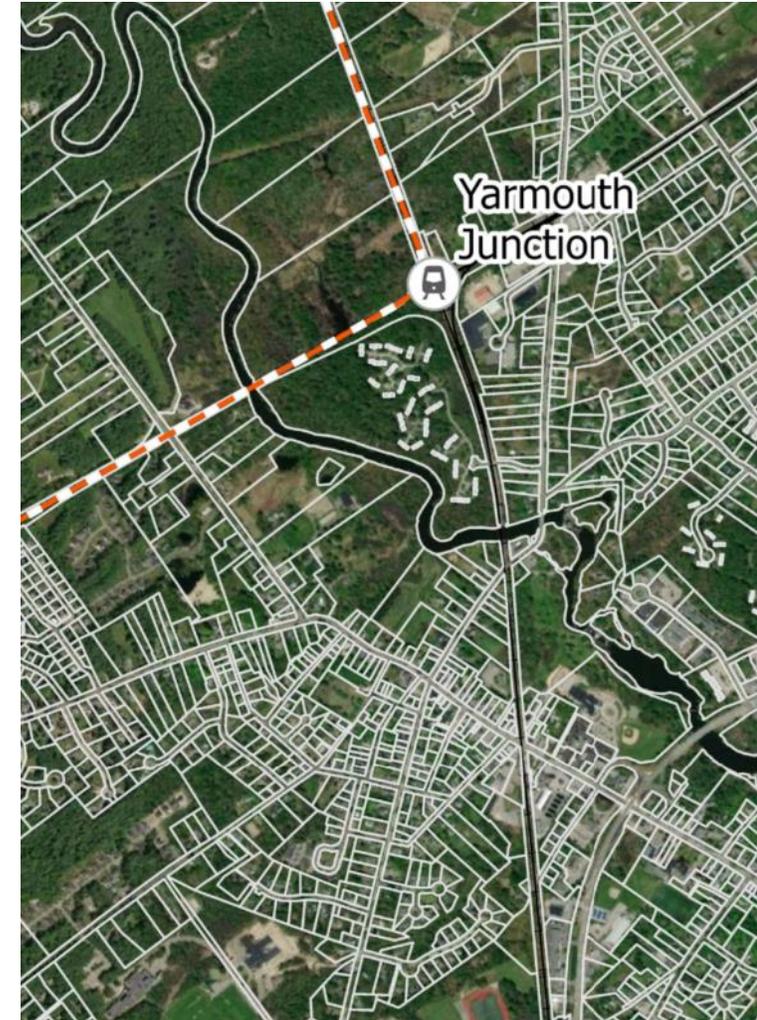
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Yarmouth Junction Site Alternatives

- **Key market analysis takeaway:**
 - Highest SF potential for service, restaurant development
 - Highest potential demand for owner units,
 - 20-35 rental
 - 300-350 owner



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- Alternative 1A
- Alternative 1B
- Railroads
- Parcels

Yarmouth Junction Station Area Visual: Low Density

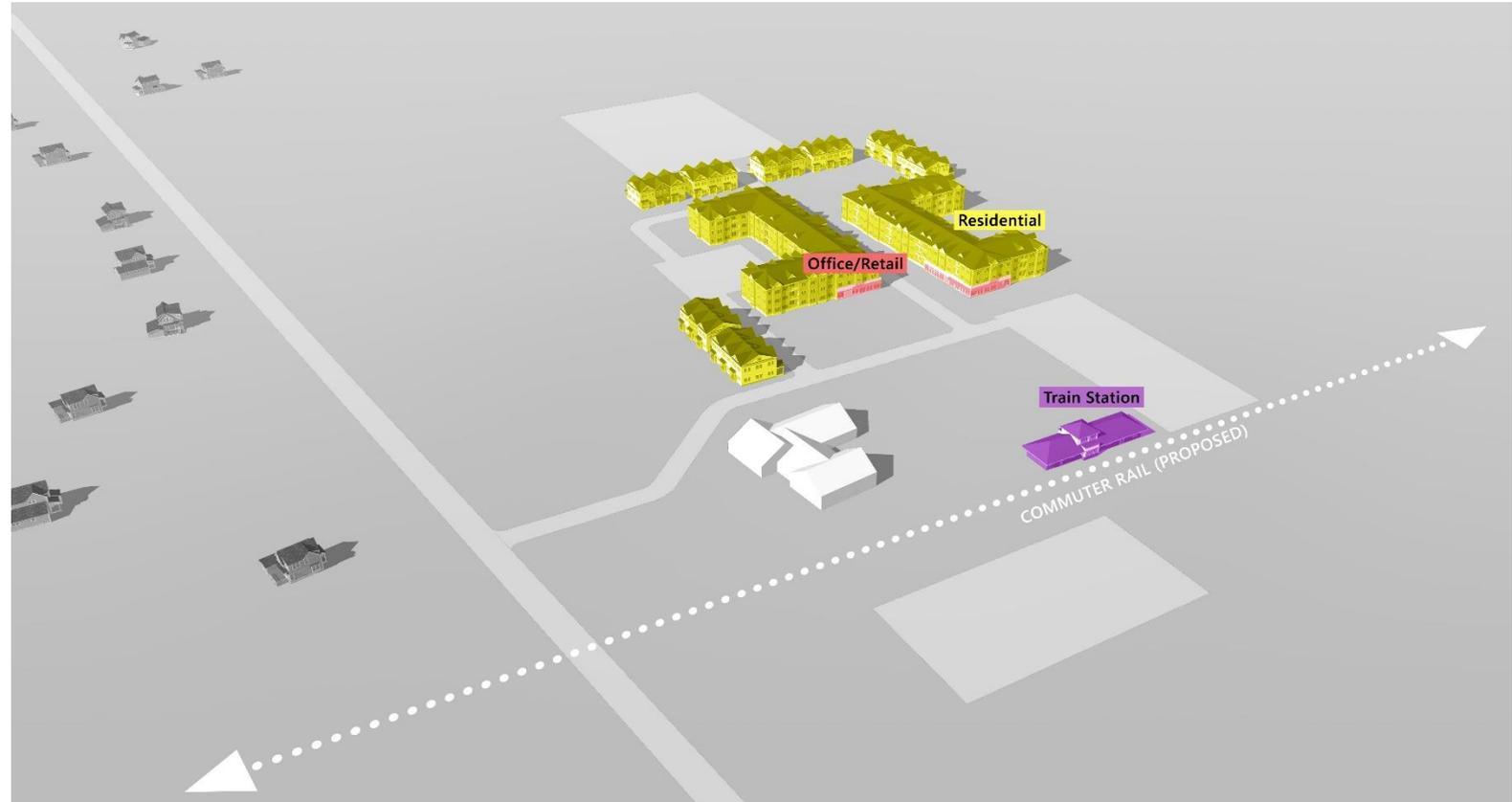
- Single family homes
- Some mixed-use development integrated with existing land use
- Intersection of Industrial, Rural Residential, Medium Residential and Commercial uses



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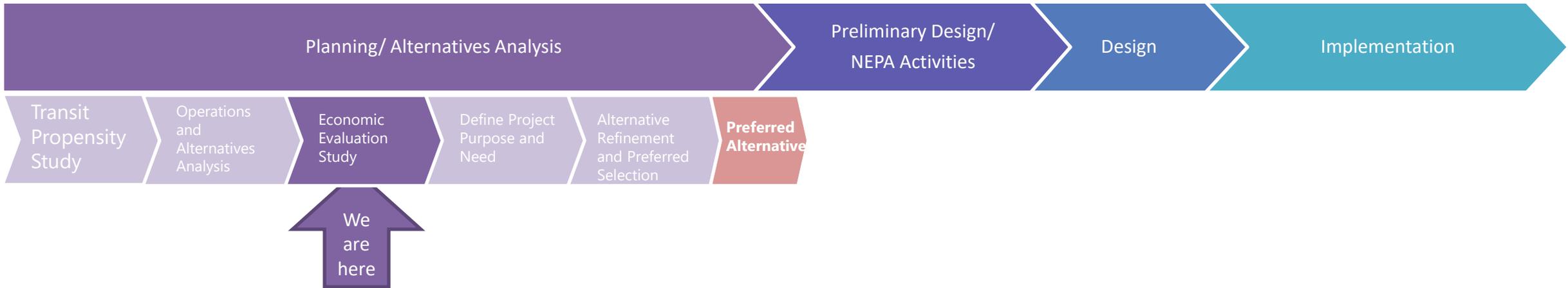
Yarmouth Junction Station Area Visual: High Density

- Residential buildings focused on station area
- Mixed-use development integrated with station
- More dense than current requirements for rural residential



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Lewiston-Auburn Overall Project Process



- Inputs gathered now will support alternative assessment and project purpose, need, and definition
- Economic impact and potential stations will be part of the selection of preferred alternative
- Individual station, specific locations, concepts, and designs will be developed in design stages

How We will use what we heard today

- How market analysis is presented, and local plans are considered
- How illustrative graphics are developed to convey potential demand and development
- Input into the overall alternatives analysis and considered alongside all evaluation metrics from the previous study (operations, cost, travel time, infrastructure, etc.)

Open Discussion



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- Alternative 1A
- Alternative 1B
- Railroads
- Potential Stations

Economic Evaluation Next Steps

- Complete stakeholder meetings
- Public meeting focused on market analysis findings and potential around stations
- Evaluate economic benefits for Alternatives 1A and 1B